

TEACHERS' RETIREMENT BOARD
BENEFITS AND SERVICES COMMITTEE

SUBJECT: FISCAL YEAR 1999/00 PRODUCTION
OBJECTIVE ACHIEVEMENT

ITEM NUMBER: 7

ATTACHMENT(S): 1

ACTION: _____

DATE OF MEETING: September 7, 2000

INFORMATION: X

PRESENTER(S): Michael Carter

Production Objectives measure the System's delivery of benefits and services to the members of the California State Teachers' Retirement System. In addition to the 1999/2000 fiscal year, Attachment I displays the System's performance for the two preceding years for comparison purposes.

In each of the program areas, staff are to be commended for maintaining the "quality" service levels our members have come to expect. These accomplishments are even more impressive when you consider the many challenges before the System during the year. Among these challenges was START, the implementation of enhanced benefits including the Minimum Guarantee Monthly Allowance and the analysis of future benefit enhancements. Increased productivity and overtime have contributed to staff's ability to maintain production at these levels.

It should also be noted that these objectives could not have been met without the cooperation and support from various organizational functions including technology, reporting, legal, administration and accounting. The System's awareness of the interdependency between these functions is critical to the ability to meet the member's expectations and continuing to improve our service delivery efforts.

The priorities, support and direction of the CEO and Board are clearly focused on providing "quality" services to the members. This clarity of purpose and focus is also necessary and appreciated.

PRODUCTION OBJECTIVE ACHIEVEMENT FISCAL YEARS 1997/98 – 1999/00

	1997/98 TARGET/ ACTUAL	1998/99 TARGET/ ACTUAL	1999/00 TARGET/ ACTUAL
SERVICE RETIREMENTS:			
Process 100 percent of all service retirement application payments within 30 days of the retirement effective date or receipt of completed application, whichever is later.*	100/99	100/99	100/99
Complete 100 percent of all final service retirement payments within 45 days of receipt of all necessary information.*	100/98	100/98	100/97
Finalize 90 percent of all service retirement payments within four months of the retirement effective date.	90/93	90/91	90/92
SURVIVOR BENEFITS:			
Process 95 percent of all applications within 30 days of receipt of all necessary information.*	95/98	95/97	95/97
Complete 95 percent of all death benefit payments for retired members within 90 days of receipt of notification of death.	100/80	95/93	95/98
Process 95 percent of all approvals within 30 days of receipt of all necessary information.	100/58	N/A	N/A
DISABILITY SERVICES:			
Process 100 percent of all eligible applications within 180 days of receipt.	100/94	100/99	100/99
Process 95 percent of all approvals within 30 days of last required document.	85/72 _a	95/100	95/99
Process 100 of all initial payments within ten working days following the date the disability is approved, the effective date or receipt of all necessary information whichever occurs last.*	100/100	100/100	100/100
PUBLIC SERVICE:			
Answer 95 percent of all calls in less than three minutes.	95/88	95/94	95/93
Answer 95 percent of all calls on the first contact.	95/97	95/98	95/97
Respond to 90 percent of all correspondence in ten working days.	90/91	90/94	90/92

^{a/} Goal modified to “process approvals within 30 days receipt of all information.”

- The accomplishment of this production objective will result in the elimination of interest penalty payments on current processing cases.

PRODUCTION OBJECTIVE ACHIEVEMENT **FISCAL YEARS 1997/98 – 1999/00**

	1997/98 TARGET/ ACTUAL	1998/99 TARGET/ ACTUAL	1999/00 TARGET/ ACTUAL
REGIONAL COUNSELING SERVICES:			
Conduct 400 workshops.		400/491	400/455
Provide 22,000 retirement interviews.		22,000/24,657	22,000/28,468
Deliver 30 mid-career programs to CalSTRS members.		30/32	41/33